

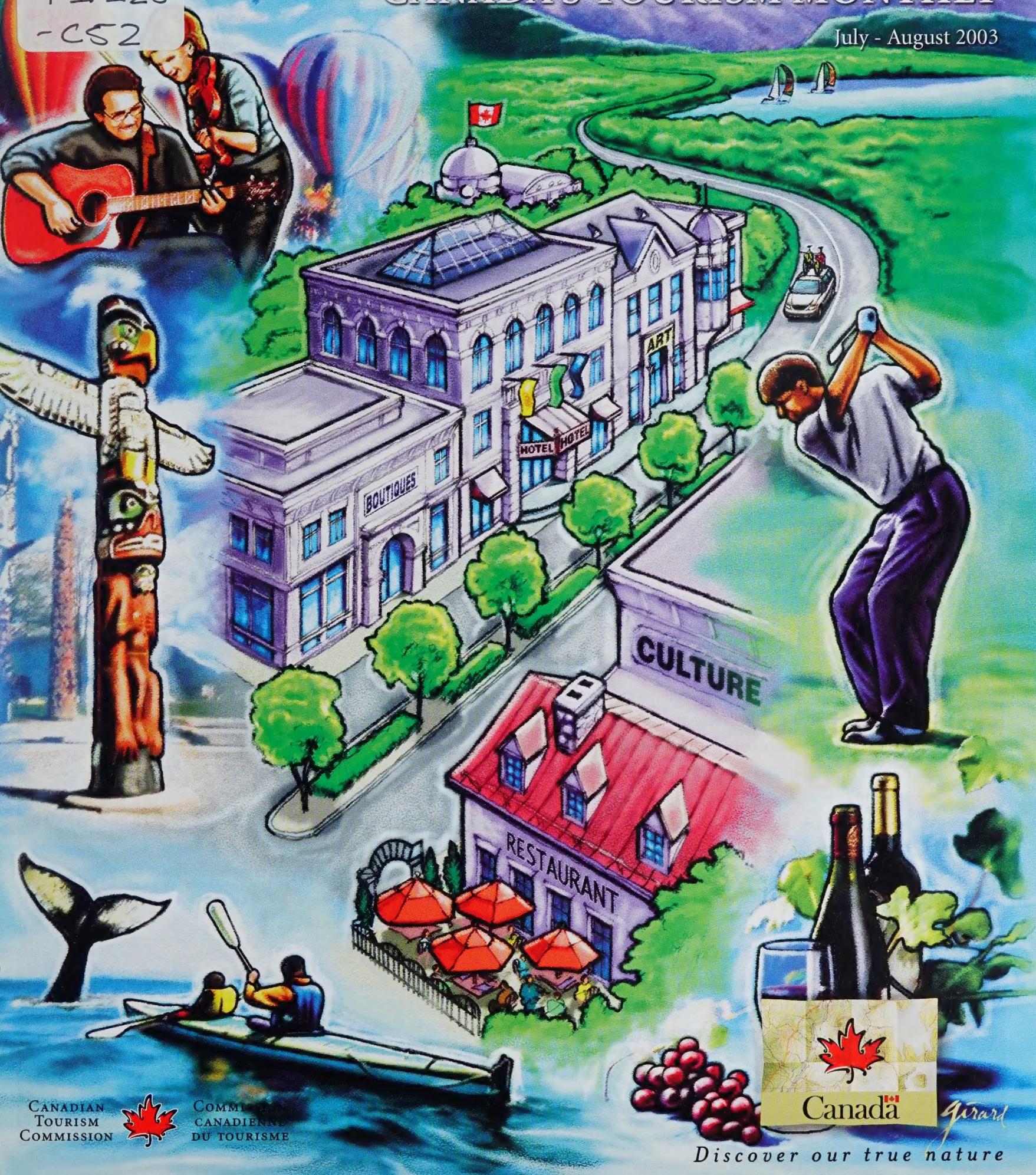
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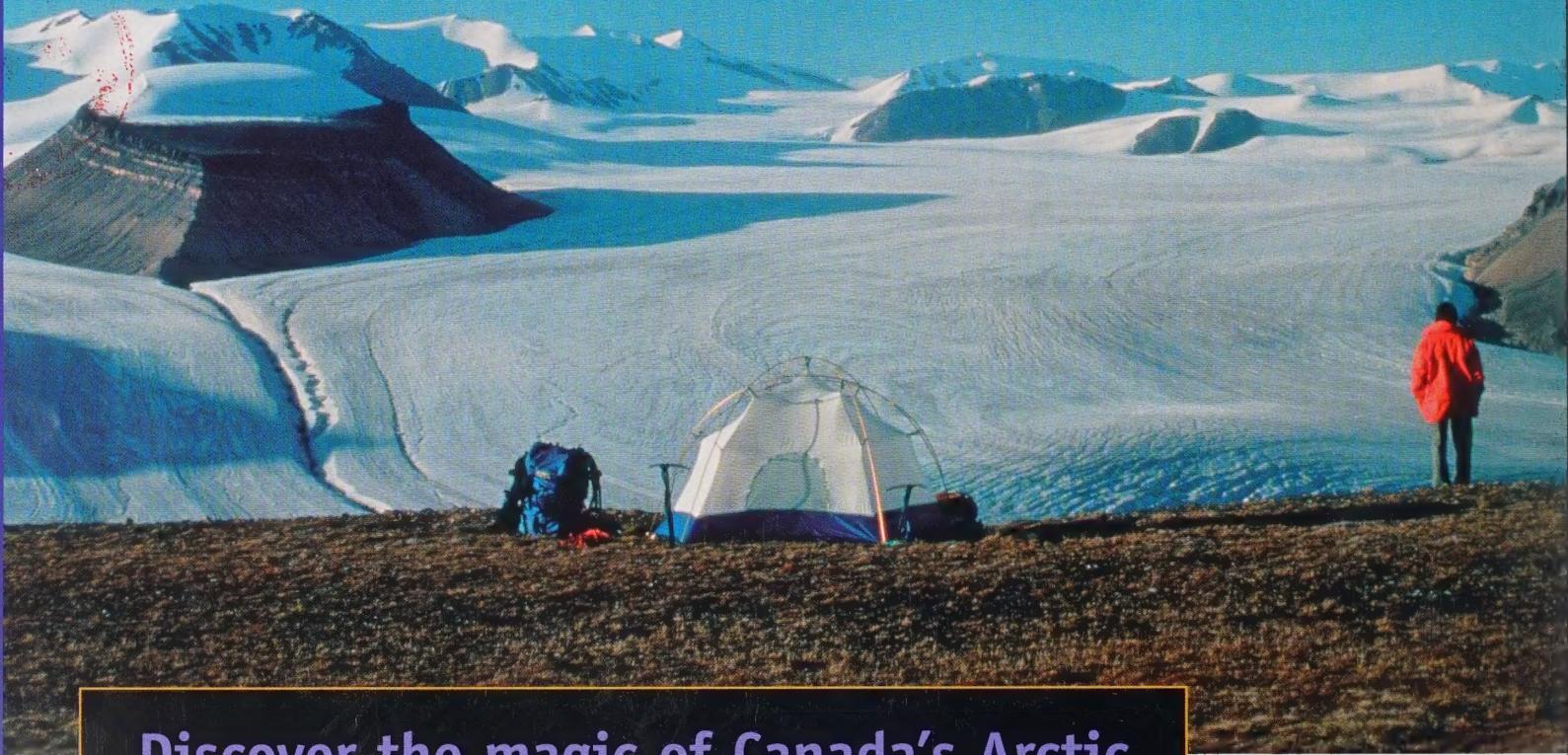
CANADA'S TOURISM MONTHLY

July - August 2003

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IN OUR COMING ISSUES

In September, **TOURISM** will examine the tasty topic of eating well in Canada – an essential part of any tourism experience. The magazine will also examine in some depth the learning travel industry, which by all accounts, is growing in strength and demand. At Issue will look at *Navigating the perfect storm*. **Deadline: August 1, 2003.**

In October, **TOURISM** will take a look at autumn, a shoulder season for many, but big business for others, notably hunting outfitters and, surprisingly, a number of motorcoach operators catering to the seniors market. We will also talk about discovering Canada through our museums, where our heritage and culture are conserved, treasured, and displayed. At Issue will look at *Infrastructure*. **Deadline: August 29, 2003.**

Month	Deadline	Features
November 2003	September 26, 2003	CHOICES: new things to do in Canada Revamping Canada's attractions
December 2003	October 24, 2003	Experience WINTER in Canada Canada, a multicultural society

Coming in 2004

We will begin 2004 with our annual CTC corporate snapshot in the January–February issue, followed by an in-depth review of Canada's flagship products from new perspectives. For example, it is becoming very evident that shorter, "getaway" trips are becoming popular – even trendy. How do our products, as they are currently packaged and delivered, fit new demographic realities? Do we need to make adjustments, and perhaps develop some new product? We invite our readers' input as we develop our 2004 editorial lineup.

New CTC publications

- Tourism Information Bulletin - Issue 14: June 2003 (C50234E)
- Monitoring Canada's Accommodation Industry During a Challenging Year - 2003 - The Impacts of the Iraq War and SARS - Quarter 1 2003 Result: Executive Summary (C50247E)

These publications are available through www.canadatourism.com or at distribution@ctc-cct.ca.

Coming Soon

- The ABCs of Financial Performance Measures and Benchmarks for Canada's Tourism Sector - Industry Financial Averages and Benchmarks for Canada's Tourism Operators - Guide 1 to 6
- SARS: The Potential Impact on the Domestic and Selected International Travel Markets to Canada - Executive Summary (C50245E)

TOURISM

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Mission: Canada's tourism industry will deliver world-class cultural and leisure experiences year round, while preserving and sharing Canada's clean, safe and natural environments. The industry will be guided by the values of respect, integrity and empathy.

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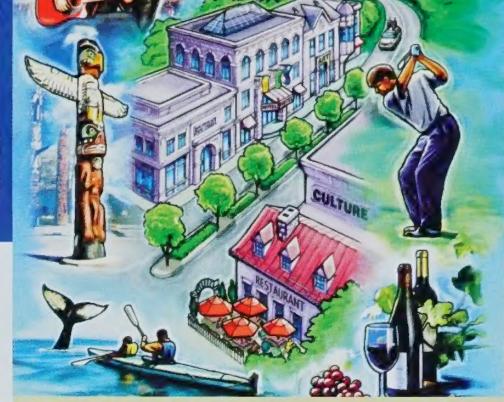
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On the cover: Summer: so many options, so little time...
Illustration: courtesy of Jean-Michel Girard,
Imagination Photo Services.



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Corrections: • Contrary to what was announced in the April issue, the Canadian National Exhibition is celebrating its 125th anniversary from August 15 to September 1, 2003. Information: www.TheEx.com

• Tourism Nova Scotia is hosting a travel media fam tour in August 2003. *The Land of Evangeline & Lighthouses* will highlight Nova Scotia's beautiful landscapes, diverse cultures and rich heritage. Contrary to what was announced in our June issue, the tour is opened to both men and women.

Information: rbrooks@gov.ns.ca

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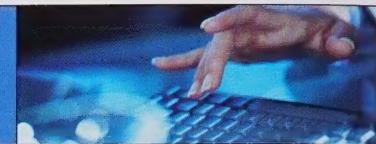
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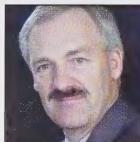
Editorial

Lurching into summer, with hope! by Peter Kingsmill

The summer of 2003 is one that Canadians will not likely forget. A winter of worries over the war in Iraq was quickly eclipsed as summer arrived, by bad news in the health and agriculture sectors. The persistent SARS outbreak in Toronto and uneasiness about BSE (Mad Cow disease) have sent the health and livestock industries reeling, and the tourism industry right along with them.

Nonetheless, Canadians will travel this summer – closer to home than normal perhaps and that is good news for the embattled tourism industry. It bodes well for the future too; the more Canadians recognize the unique vacation opportunities in their own country, the more they will explore it in future years. Americans are travelling too, and a gratifying number of them see a Canadian vacation as intriguing, close to home, and safe.

There is something about crisis that engenders reflection, as people strive to cope with new realities and seek new options. Our tourism industry researchers tell us that the baby boomers are getting older (gee, so it's not just me!) and are looking for different vacation products than they were a few years ago: softer adventure, enhanced cultural experiences, more city-based options.



Industry Minister Allan Rock has announced the appointment of W.R. (Bill) Allen to the board of directors of the Canadian Tourism Commission (CTC) for a term of three years. Allen is Deputy Minister of Tourism and Recreation for Ontario, and is the public sector representative on the CTC board for Ontario.



U.S. big game hunters may not be allowed to bring animal trophies across the U.S. - Canada border as part of the current U.S. ban on beef imports from Canada. Uncertainty about the transfer of the disease BSE across wild and native ungulate populations may put trophy heads from game animals, as well as meat and hides, on the banned list. Up-to-date information is available at www.canadatourism.com.

In this issue of *TOURISM*, we have put together some information about a demographic market that, almost literally, is "coming of age". There is, according to many sources, a rapidly growing youth tourism industry which several countries like Australia, New Zealand, and Taiwan are developing in a big way.

True, these young travellers don't fly first class very much – if they fly at all once they have reached their destination of choice. Nor do they populate the pampering resorts and big-ticket hotels except, sometimes, as workers. However, statistics in other countries show that they stay longer, and leave behind more money, than the baby boomers. They also tend to spread their money into less-travelled regions as they explore, learn, and enjoy the host country.

As we forge our recovery from the shocks of the new millennium, we will require the energy of youth, and the wisdom of our elders. This summer, may our tourism businesses, our tourism families, and our visitors themselves enjoy a measure of prosperity and unlimited enjoyment of this special destination: *Canada!*

Peter Kingsmill, Editor-in-Chief



The federal government has so far announced contributions of over \$37 million towards a tourism recovery program for Canada in response to an industry in crisis. Most recently, a joint announcement June 6 by Industry Minister Alan Rock and Transport Minister David Collenette allocated \$10 million for Toronto, and \$7.5 million for the Canadian Tourism Commission to assist with a pan-Canadian recovery program.



Financial consulting firm KPMG has produced a Tourism Expenditures Monitor that spells out the magnitude of revenue losses to Canada's tourism industry from the SARS crisis. Between March, April, and May, the aggregate decline in tourism expenditures in the Toronto area is estimated by KPMG at almost \$190 million. In April alone, Montreal lost \$17.1 million, Ottawa \$7.1 million, Calgary \$6.2 million and Vancouver lost \$39.4 million. The report was created for the Hotels Association of Canada. www.hotels.ca

Letters to the Editor

I write to support the observations of Marc-André Charlebois and Randy Williams (*TOURISM*, April and May issues) on Canada's lack of a national transportation policy. Despite the long wait and hoopla surrounding the release of *Straight Ahead - A Vision for Transportation in Canada* the document leaves an informed reader flat.

The document demonstrates an understanding of the complexity of the issues but the solutions posed lack substance and clarity. There are

no real implementation timelines, budget commitments and performance targets - the usual measures of business accountability. As Charlebois notes, "our government does not think strategically."

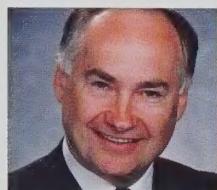
Transportation is a shared federal/provincial/territorial responsibility. This reality suggests there is a first ministers' responsibility and we should be putting pressure on (them) to get their act together. The federal government, after all, says it is willing to "explore new governance models".

There are the numerous industry trade organizations that are involved in transportation, from engineers involved in building needed infrastructure to TIAC and the companies involved directly in the provision of transportation services. Who will bring these diverse interests together and help forge a common alliance? We have the collective numbers to attract political attention if we all cooperate.

Both Williams and Charlebois have done an admirable job in making

sure our industry understands the issues and *TOURISM* magazine is to be commended for keeping the issue front and centre. However, my challenge to the readers is this: do we have the collective vision, strategy and leadership to find solutions and get action? The longer we wait, the bigger the problem becomes. It is time to start digging ourselves out of the hole.

*Ian D. Robertson
Whitehorse, Yukon*



At Issue

by Randy Williams

Powered by people

This issue of *Tourism* will be in the hands of readers in the midst of Canada's peak tourism season, a time when labour shortages in our industry are generally most pronounced. Although staffing pressures may have been alleviated somewhat by the negative effects on current and projected tourism revenues of SARS and other events, this situation is only temporary. Human resources will be an ongoing challenge for Canadian tourism over the longer term.

Canada's tourism success is powered by people, a workforce that transforms an unequalled range of opportunities into experiences that keep visitors coming back for more. But that success has been threatened in recent years. Under normal economic conditions, Canadian tourism businesses find it increasingly difficult to recruit and retain employees.

Squeezed between an ageing population at one end of the demographic spectrum and lower fertility rates at the other, Canada is facing growing labour shortages across all sectors. Meanwhile, labour demand keeps rising thanks to economic growth, while Canadian immigration policies do not reflect the country's industrial needs. According to the Conference Board of Canada, there will be a shortfall of 950,000 workers in the Canadian economy by 2020.

The tourism industry may be especially at risk, because of both its reliance on personal attention and service, and its ongoing development. Tourism is the world's largest and fastest growing industry, and once the current economic crisis is over tourism will again have to compete with other industries for a shrinking pool of potential workers. The question is: how can we do that successfully?

Industry, of course, must take the lead. The British Columbia Human Resource Task Force is an inspiring example: Tourism B.C., the Hospitality Education Advisory Committee and the Council of Tourism Associations, with provincial and federal government support, will work together to develop a provincial tourism human resource strategy for the industry.

We must create awareness of tourism career opportunities, and give potential workers the information they need to pursue them. In doing so, we must overcome various myths about the pay and working conditions associated with tourism jobs, and focus on their many advantages. Tourism offers more variety, people contact and learning opportunities – and better chances for rapid career advancement – than any other industry I can think of. We must also develop effective employee retention strategies. After all, recruiting new workers is only half the battle, and an expensive option at that. Tourism businesses also need to keep the employees they already have.

The Canadian Tourism Human Resource Council, a partnership of business, labour associations including the Tourism Industry Association of Canada (TIAC), educational institutions, and government, serves as an invaluable resource to these efforts. In addition to facilitating national occupational standards and professional certification, it provides training resources, promotes a training culture, supports career awareness, and acts as a clearing house and forum for information sharing.

While industry has a key role to play in addressing human resource challenges, we cannot do it alone. TIAC has been telling Ottawa that support is needed for employment, training and school-to-work transition programs, as well as for sector councils like the CTHRC and proactive immigration rules.

I hope to hear readers' ideas about how our industry and government can meet current and emerging human resources challenges.

Send your comments to info@tiac-aitc.ca.

Skills development funding

The Honourable Jane Stewart, minister of Human Resources Development Canada, has announced a \$6 million federal contribution to support the Canadian Tourism Human Resource Council's (CTHRC) "Ready to Work - Tourism Careers" program.

This funding will enable the CTHRC to provide skills development and youth internship opportunities for approximately 2,000 interns and 500 employers from all provinces and territories. The program will help youth between the ages of 18 and 29 make the transition from school to work in the tourism industry through a mix of classroom and on-the-job training.

Businesses participating in the program will benefit by acquiring skilled individuals and discovering the value of human resources development. Industry representatives are expected to contribute approximately \$2.9 million to the program. Positions available through this program include kitchen/line cook, front desk agent, local tour guide, tourism visitor information counselor, bartender, food server, housekeeping attendant and sales associate.

The federal government has also committed almost \$1.5 million to support the CTHRC's Infrastructure Project, allowing the Council to respond to skills needs, represent the collective interest of industry partners, and develop links with the education system to create a skills and learning architecture promoting workplace learning.

Information: www.hrdc-drhc.gc.ca or www.cthrc.ca

Keeping the tourism industry on course.

The Tourism Industry Association of Canada is the national voice of the tourism sector and the source of information and development for tourism professionals from coast to coast. If you and your business are part of this vital and thriving industry, join us, let your voice be heard, and benefit from our innovative member programs and events.

Visit online for more information at
www.tiac-aitc.ca



Tourism Industry Association of Canada
Association de l'industrie touristique du Canada



Australia: an aggressive tourism model

The Australia Tourist Commission (ATC), with its 240 employees at work in more than 14 different countries, is similar in many ways to the Canadian Tourism Commission (CTC). The ATC is an Australian government statutory authority (similar to a crown corporation), which allows it to operate as an entity separate from the federal government. Governed by a 10-member board reporting to the federal Minister for Small Business and Tourism, Australia is divided into a number of State and Territory Tourism Organizations (STOs)

which, in turn, market their region domestically and to a lesser extent, internationally.

"The ATC is essentially a marketing organization - we market Australia internationally. We have no domestic responsibilities - we leave that up to the STOs to attract interstate visitors," says Samantha Collins, media relations' manager, ATC Los Angeles. "We devise ad campaigns according to a strategic media plan that targets our key market demographics.

"For large campaigns, like last year's \$3.5 million US Qantas campaign, we co-op the promotion with our airline and industry partners."

Collins adds, "The ATC contributes funds, Qantas contributes funds, the wholesalers featured in the campaign contribute funds and in some cases, the states featured in the campaigns contribute funds. This gives the campaign more impact than if those partners ran ads on their own."

A public relations team, with offices in Canada, and the U.S., oversees the Visiting Journalist Program, which invites journalists from around the world to come and experience everything that Australia has to offer. Costs for the trip are offset by industry alliances and the itinerary is created by the hosting STOs. "The program is central to our public relations activities. This year to date we've secured publicity worth more than \$173 million US – naturally we could never afford to purchase this type of exposure!"

"In the financial year 2001/02, the ATC had a budget of approximately \$120 million AUD. This included \$97 million from government, \$12.4 million from advertising opportunities, \$391,000 through the sale of goods and services; and \$9.2m from industry."

The ATC head office (in Sydney) coordinates research and development, plans trade shows domestically and organizes the ATC's involvement in trade shows throughout the world. The ATC is also responsible for "segment development", an initiative similar to the CTC product club program, which binds together tourism industry partners to expand the marketing potential of key segments like backpacker travel, indigenous tourism and food and wine tourism.

The ATC has a mandate to promote Australia as a tourism destination throughout the world, but it is also called upon to ensure all of Australia benefits from a strong tourism industry, and not just the major destinations. The result is the

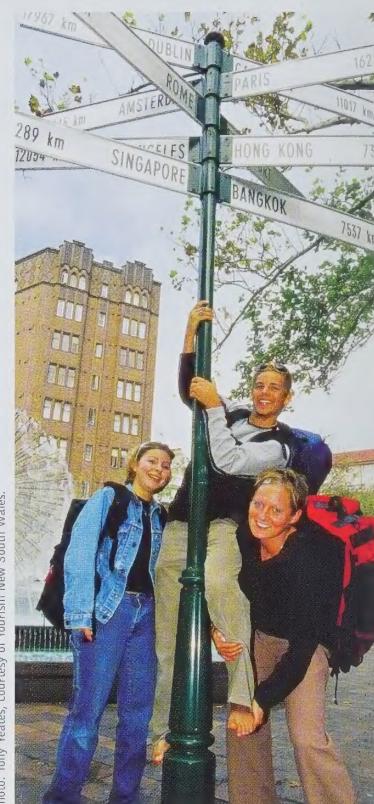


Photo: Tony Yates, courtesy of Tourism New South Wales

Australia's tourism industry is heading in new directions.

creation of the "yield and dispersal" program, which was designed to do just that; disperse the income from tourism throughout the country, allowing for the smaller operations and destinations to develop and flourish along with their larger, and better known, counterparts.

Operating independently from the ATC, the STOs have their own budgets, secure their own funding, and create and market their own products. They run their own international offices, often working in close quarters with the ATC. Funded entirely by their own state governments, each operates with a CEO reporting to a board of directors, responsible in turn to the state tourism minister.

A continent-wide tourism industry requires fast and efficient communication between the STOs and the ATC, a need addressed by the Australian Tourism Data Warehouse (ATDW), which is a joint STO/ATC initiative. With each jurisdiction actually managing its own statistical databases, the ATDW makes possible the sharing of information across the regions. *

Information:
www.atc.australia.com

Backpacking Australia

Australia has gone into the backpacker market with determination, and indicators show that it is paying off. Here are some highlights:

- 447,000 backpacker visit Australia each year
- 31 million overnight stays per year
- Primarily from western markets
- 75 percent of backpackers are under 30 years old
- The U.K. accounts for 25 percent of backpacker visits (over 110,000).
- Backpackers stay an average of 70 nights, in contrast to 27 nights for all other visitors.
- Older backpackers (40 plus) take shorter trips, less than 40 nights on average.
- Backpackers spend a total of \$2.4 billion per year, twice as much as the average for all other visitors.
- Average spending: Backpacker: \$2,500; Other tourists \$1,039.
- Backpackers from the U.S., Canada, U.K., Germany, and Ireland spend more on average.
- Backpackers see the major tourism destinations but are three times more likely to visit Australia's lesser known destinations.
- Popular activities range from beaches (78 percent) to pubs (70 percent) and visiting galleries and museums (51 percent).
- Over half of backpackers (51 percent) visited friends and relatives but fewer than 10 percent list that as the main purpose of their visit.
- Unstructured trips dominate backpacker travel with 83 percent not purchasing any travel packages or accommodation prior to arrival.
- Fifty percent of backpackers decide to travel less than six months prior to departing.
- Many backpackers apply for Working Holiday Visas (WHV), which allows them to work for up to one year – the number of visas granted has risen from 35,000 in 1995 to over 85,000 in 2003.
- 40 percent of backpackers use the Internet to research Australia, but only 14 percent use it to book flights or accommodation. *



Storefront

The time to join forces has come

by Marc-André Charlebois

It is said that fighting a common enemy tends to create bonds. How about fighting multiple common enemies? The enemies I'm referring to here are the combined and lingering effects of the war in Iraq, the SARS health scare, BSE and the precarious situation of our national airline.

I hope my humour about our present predicament will not offend readers. We are indeed fighting on several fronts, yet I believe this situation is helping to bring the various sectors within the tourism and the travel industry closer together. And that's certainly a good thing. Case in point: the recent formation of the Travel Industry Cost Coalition (TIIC), which brings together airlines, hotels, airports, and tourism and travel retailers. Our common objective? The elimination of taxes and surcharges that create a disincentive to travel. As we struggle alongside our sister organizations, we realize we have many more common objectives; this coalition may be just the first step towards closer ties amongst all of our industry's stakeholders.

Another example of joint effort is the project to create the Canadian Travel Exchange (CANTX). I have used this column to inform you about this initiative and would like to seize yet another occasion to keep you posted on our progress to date. The events of the past few months have affected our prospects for securing adequate financing, and have forced the project team to review its business plan and timelines. As I write this, we are still awaiting a response from the CANARIE program for financial support to the tune of \$250,000. CANTX could be up and running as early as October

this year, albeit in a trimmed down version of what it will eventually become by spring 2004.

We have also launched a parallel effort to invite other countries to emulate the virtual travel exchange concept. GLOBETX has the mandate to spawn CANTX-like exchanges around the world. It has the solid backing of the Canadian Commercial Corporation and has already secured a number of agreements, notably with the Organization of American States and the Government of Panama. I presented the concept at an UFTAA (United Federation of Travel Agency Associations) meeting in South Africa in late April, and several countries represented there asked for detailed information. Could it be we have a winner here? Should I remind readers that a venture like CANTX brings together tourism and travel suppliers, providing a unique marketing and sales pipeline for Canadian destinations and experiences?

Finally, individual travel retailers are retooling to include domestic products in addition to their more traditional offerings. Diana Young, a former director of ACTA, was recently quoted as follows in the Canadian Travel Press: "travel retailers must start to give serious consideration to selling more domestic travel products and becoming specialists in a few of those products." All this is to say there appears to be a rather significant silver lining to this cloud, and I have reason to believe these initiatives bode well for tourism, travel and the Canadian economy. *

The business of backpacking

The international backpacker market has proven to be a beacon for steady tourism growth in Australia. Backpacker tourism is a key growth area within inbound tourism and the Australia Tourism Commission (ATC) has increased its focus on this market. The ATC feels that investing in this market segment now will provide substantial returns in the future. The hope is that backpackers of today, will return with their families as the tourist of tomorrow.

To further efforts in creating a sustainable and profitable tourism industry, based on backpacking and youth travel, the Backpacker Tourism Advisory Group (BTAG) was created. The aim of BTAG is to provide leadership and communication amongst the members of the backpacker tourism industry within Australia. It consists of 12 industry-level committee members, one representative of the ATC and one representative from the State and Territory Organizations (STO).

The BTAG guides the participation of the ATC in trade events, such as the World Youth and Student Travel Conference (WYSTC), to be held in October 2003 in Pattaya, Thailand. The WYSTC is the only trade fair and conference devoted exclusively to the youth and student travel industry. Attracting buyers and sellers from around the world, WYSTC has more than 900 international delegates, representing 450 companies in over 70 countries in attendance. The BTAG is also a driving force behind the Australian Backpacker Industry Conference, an annual event bringing together the industry to address barriers to backpacking tourism and find new means to develop the market. *



Financial planning aids

In this fragile economic climate for the tourism industry, tourism operators will have to be vigilant in managing their business establishments to stay competitive and increase profitability. With this in mind, the Canadian Tourism Commission (CTC) has published a series entitled *The ABCs of Financial Performance Measures and Benchmarks for Canada's Tourism Sector Guides*. There are six guides in the series:

- Guide 1 - Financial Planning: Key to Maximizing Your Bottom Line
- Guide 2 - Profiling Your Financial Statements
- Guide 3 - Financial Performance Measures and Benchmarks for Canada's Tourism Operators
- Guide 4 - Decision-making Tools for Canada's Tourism Operators
- Guide 5 - Linking Your Financial Performance Measures to Your Business Plan
- Guide 6 - Industry Financial Averages and Benchmarks for Canada's Tourism Operators.

These six financial planning guides were written for tourism operators, who have little or no experience in the area of finance. These guides can be used as reference documents by tourism operators who wish to better understand the language of accounting and finance, maximize the utilization of the financial planning spreadsheet, and discuss with more self-assurance their financial plans with investors. These guides become progressively more sophisticated, ranging from the principles of finance and culminating with cutting edge performance measures and financial analysis and decision-making techniques. *

The guides, as well as customized financial planning spreadsheets, are available at www.canadatourism.com.

Study reveals outdoor trends

The IATOS Expo (International Adventure Travel and Outdoor Sports Show) in Chicago this past winter provided the Canadian Tourism Commission's (CTC) outdoor product development group with the opportunity to survey the show's outdoor enthusiast attendees using touch-screen technology. In return for a chance to win one of two great travel prizes (one to Newfoundland/Labrador and one to Saguenay, Quebec), delegates were asked to complete a survey on their activity levels, activity interests, travel behaviours, and their interest in Canada as a future outdoors destination.

The full report is available on the CTC Web site. Here are some key findings and conclusions:

- Travellers on the whole expressed more of an interest in learning about the nature, culture and environment of the destinations that they visited than in engaging in more physically rigorous activities. More travellers wish to make



The Bay of Tadoussac, in Quebec's Saguenay region is one of The World's Most Beautiful Bays, offering scenic beauty and a welcoming atmosphere to travellers of all ages.

the most of their leisure time and this includes incorporating both education and activity. This finding coincides with results from the CTC's Travel Activities and Motivation Survey analysis whereby 50 percent of American Hard Outdoor adventure Enthusiasts and 41 percent of American Soft Outdoor Adventure Enthusiasts were also Heritage Tourism Enthusiasts.

- "Scenic" and "friendly" were the top two attributes chosen for Canada from a list of possible positive and negative attributes (selected by 82 percent and 78 percent of respondents, respectively). Certain attributes were less likely than others to be selected by respondents and some image boosting may be required. For instance, Canadian hospitality was selected by only half of respondents.

- Despite favourable perceptions and the high likelihood of travel to

Canada, awareness of Canadian destinations was relatively low. Knowledge of destinations and products continues to be a key challenge if Canadian destinations are to convert American outdoor enthusiasts' interest and positive perceptions into actual travel plans to Canada.

- While very few respondents had no interest in travelling to Canada, approximately one-third of respondents were undecided and may therefore require enticements to make the trip. These undecided travellers were generally somewhat less positive about Canada and less aware. Respondents with higher activity levels and those who had travelled to Canada in the past generally had more favourable ratings for Canada.
- A large percentage of these travellers enjoy the combination of wilderness and urban experiences on their vacations. More of these outdoor enthusiasts had visited

Canada's urban destinations in the past than had visited its wilderness destinations. Packaging partnerships are therefore an important concept to link urban and wilderness destinations. Additionally, a large proportion of these outdoor enthusiasts had purchased guided half-day and day trips in the past, packages that include airfare, and multi-activity packages.

• The average amount typically spent by these individuals on their outdoor adventure trips was \$2,100 USD, which is substantially higher than the average amount spent by typical American pleasure travellers to Canada (\$533 per trip in 2001 according to Statistics Canada). Their average length of stay on their major outdoor trips was also longer than average, at 9-10 days. 

Information:
www.canadatourism.com

Meeting X-pectations

by Wendy Swedlove

In the ever-evolving tourism landscape of a post-9/11, post-war, and hopefully post-SARS world there remains one constant...the strength of your people is what will see your business through these troubled times. Statistics indicate that the present slow period is likely a "blip" in the continued growth of the tourism sector in Canada and around the world. The demographic situation in the Western world will create an increasingly tight labour market. Employers need to look at how they can appeal to job seekers, and what they can offer to become the "employer of choice". The tourism industry is better suited than most in its potential appeal to the young job seeker.

A key demographic for tourism employers is a group known collectively as Gen X'ers – people born between 1961 and 1981. As with the Baby Boomers who

preceded them, Gen X'ers are often depicted as a homogeneous group that share all the same attributes and value systems. Popular media has portrayed this generation as "slackers" who lack the drive of their parents. However, this perception is a misnomer and focuses on a small minority of people in this age bracket. The majority of Generation X is made up of people looking for opportunity, and it is this same theme of "opportunity" on which the tourism industry needs to focus if it hopes to attract these people.

In his ground-breaking novel *Generation X*, Canadian author Douglas Copeland noted that this new generation was interested in pulling away from money and status, and more interested in working in an environment they enjoy. This demographic is well educated, computer savvy, seeks excitement,

and is more than willing to change direction along the career development path.

For a generation of Canadians that have a thirst for learning and that are searching for jobs with diverse challenges and opportunities for advancement, the tourism industry is ideal. It is a fast-paced industry that requires employees to be dedicated workers and quick thinkers that can handle change, typical qualities of Gen X'ers. Tourism jobs range from front desk agent and food and beverage server positions, to more non-traditional occupations such as special events coordinator, director of sales and marketing, freshwater angling guide or tour director. With diverse needs throughout its sectors, the tourism industry offers opportunity for almost every personality, working style, and skill combination.

Once the industry enters recovery mode from the "shocks" of the war in Iraq and SARS, we are expecting to see growth patterns once again hit levels similar to the late 1990s. The industry will need to look outside of its traditional labour pool to keep positions filled, and we will need to look at how we market ourselves as an industry where opportunities abound for the opportunistic. Our challenge will be to determine what appeals to each of our potential labour pools, and market a career in tourism to them in a manner that appeals to their sociological needs as much as their monetary ones. 

Information: www.cthrc.ca

Wendy Swedlove is President of the Canadian Tourism Human Resource Council.

Is Canada FIT?

The free independent traveller, or FIT, is not new. But analyzing this market sector is relatively new, especially in Canada where, according to one sector official, concerted efforts to gear up for FIT are just starting.

Specialists see clear structural barriers opposing the growth of the FIT market in Canada. "There are not enough operators serving the FIT market, winter also makes things more complicated, and the difficulties in getting working visas in Canada don't help," says Paul Crooks, vice-president of Global Village Backpackers.

But Crooks sees solutions and opportunities: "For instance, we should develop more ski/winter stays, and the Canadian Tourism Commission should be more involved in the FIT market." He adds, "Look, the potential

for the FIT market is enormous in Canada. We have almost everything in this country that young travellers like. And travelling here is relatively inexpensive".

Dale Eisen of Toronto is the publisher of TRIP, a series of free travel guides designed for FITs and language students in Canada. "A key finding in our work has been that FITs in Canada tend to stay in one region – the west or the east generally. And if they like it, they plan to come back and see another part of Canada. Transportation by air is too expensive in our country for FITs to do cross-country itineraries," explains Eisen. He says this approach to travel in Canada is why his guides are regional guides, and why innovative FIT-specific transportation options like the Moose Travel Network work in loops, one in western Canada and one in the east. *

Canada extends a warm welcome

In response to the slump in worldwide tourism caused by 9/11, the Japan Canada Tourism Association (JACATA) launched the *Welcome Canada* program. Originally planned for just one year, recent events have prompted the JACATA to continue the program. In very simple terms, *Welcome Canada* strives to ensure Japanese guests feel safe, secure and comfortable during their entire stay in Canada. The program sees a *Welcome Canada* logo displayed at key destinations, on Japanese speaking guides and hospitality staff.

When travellers see the *Welcome Canada* logo they know that someone will be able to help them, ensuring they get

the most from their vacation. These clients then return to Japan with a positive impression, helping to revitalize Canada's image through word of mouth promotion.

The Japan Travel Bureau rates Canada very highly in customer satisfaction. A preliminary estimate from Canadian Tourism Commission research shows that Japanese visitors to Canada increased by 4.3 percent in 2002; a time when many other markets were in decline. To expand this effort, partners have duplicated the logo for their buses and attractions. *

Information: jack@netcyvr.com

Canada Specialist program a winner

The second phase of the Canada Specialist program (CSP) in Germany will end with a final examination in August. More than 300 of the basic level participants will be tested on what they have learned over the past three years. Of the 300, 100 will be given the opportunity to join the advanced level "Top 100".

Started in 1998, the German CSP is a true success story, and is now considered one of the most efficient long-distance

learning programs for travel agents. Members are continuously provided with an abundance of product information and sales tools. "TOP 100" members have reported a total turnover of roughly \$500,000 as a result of this program, which will be re-launched in 2004. Two years ago, the CSP program was extended to Switzerland where there are now 61 members. *

Lobsters speak out for Canada

Not just anyone can do justice to the supremacy of fresh lobster from Canada, even in France. Jean Soulard of the Fairmont Le Château Frontenac in Québec City prepared a Canadian lobster feast for 140 guests as part of the *Variations autour du homard du Canada* (*Variations around lobster in Canada*) at a well-known chain of Paris brasseries (brew pubs). This ninth edition of the

lobster feast kicks off a promotion to the Frères Blanc chain's 125,000 clients, highlighting international trade and tourism to Canada. The project is the initiative of the France office of the Canadian Tourism Commission; besides Frères Blanc, partners include Air Canada, Vacances Canada, the Tourism Association of Magdalen Islands, and Agriculture and Agri-Food Canada. *



Untangle the Web

by WorldWeb Travel Guide

What Web site traffic statistics are most important?

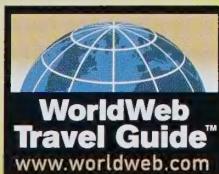
Having access to detailed traffic statistics is essential in evaluating your Web site's performance. At a minimum, your Web site statistics provider should offer three types of information: Visitor Summary, Page View Summary and Referring Information.

Visitors or Unique Visitors – Counting visitors is an effective way to gauge Web site performance. These reports should include summaries organized by year and month, giving you an opportunity to identify trends. Keep in mind that the visitor who views one page of your site is given as much significance as the visitor who views every page. And be careful not to confuse visitors with hits. A hit occurs every time a piece of information is loaded from your Web page, such as a graphic or sound clip, and is consequently a poor indicator of your site's popularity.

Page Views – Knowing your site's page views is also important. Reports should indicate the total number of pages being viewed and which pages are most popular.

Referring Information – Referring Information lets you know how people are finding your site. Is your site being bookmarked? Which search engines and portals are sending you the most traffic? What search engine keywords are being used to find your site? Without referring statistics, it's hard to know where to spend your Web site advertising dollars. *

WorldWeb Travel Guide offers free business listings, online advertising, and Web site hosting & design services.



Strong numbers for RVC

by Margot Booth

Business was brisk during the 27th edition of Canada's premier international tourism marketplace, May 24-28 at the Vancouver Convention and Exhibition Centre. With a total of 1,828 participants, including 1,485 registered delegates, Rendez-vous Canada (RVC) 2003 came close to breaking the attendance record set in 2001 – an impressive feat given recent events that have challenged the tourism industry worldwide.

On the seller side, there were 870 delegates from 535 organizations, along with 200 from destination marketing organizations (DMOs), provincial marketing organizations (PMOs) and airport authorities, as well as Tourism Mall participants. On the buyer side, 330 delegates represented 243 organizations. Compared to 2002, buyer

attendance was up for the Asia/Pacific region (69 delegates representing 53 organizations), Canada (45/28) and Europe (143/102). It was down slightly for Latin America (15/13) and the United States (76/47). Overall, more buyers attended this year than last. There were also 35 registered Canadian and international media delegates.

More than 22,000 individual meetings took place between international buyers and Canadian sellers of tourism products, who negotiated sales that are likely well in line with the \$350 million estimated as the historical average for business conducted at RVC each year.

When not busy on the marketplace floor, in the Tourism Mall or in the PMO/DMO area, delegates enjoyed excellent food and entertainment at

luncheons and receptions showcasing Vancouver, British Columbia, the West Edmonton Mall, the Yukon, Canada's Acadian community and Québec, and highlighting the activities of the Canadian Tourism Commission (CTC). And for the first time, the Tourism Industry Association of Canada, which has operated RVC on behalf of the CTC since 1997, hosted a special networking reception. Delegates also had the opportunity to join various city and activity tours of Vancouver, as well as post-event familiarization tours in other parts of the province.

In addition to providing an efficient opportunity for international buyers and media to meet suppliers of Canadian tourism products, services and information, RVC met some other important objectives again

this year. It succeeded in increasing awareness in international travel markets of Canada as a first-class destination, expanding the range and number of competitive new Canadian products, services and packages, and informing the tourism industry here and abroad of Canada's international marketing activities and plans.

Planning is already underway for Rendez-vous Canada 2004, set to take place in Montréal, May 1-5 next year. The marketplace will move to Saskatoon in 2005. *

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Margot Booth is director of Communications and Public Relations at TIAC.

Targeting tickets for tourists

In the last few years, cultural events have grown in popularity as a tourism product. Concerts, festivals and theatrical productions are all staples of summer entertainment in Canada, and all require tickets. This summer, operators are expecting a lot of domestic and rubber-tire tourism. These travellers are often hoping to attend plays and concerts but will not book a trip unless they are assured of getting a ticket. The industry is currently looking for ways to provide tickets, at a fair price, as part of getaway packages for consumers. Small operators cannot afford to book large blocks of tickets from Ticketmaster, because of the high up-front cost.

As a solution, new relationships are developing between the arts and entertainment industry, and the tourism industry. Sylvie Nadeau, president of SN Tourisme culturel states, "I could not afford to pay up front for 30 tickets, so I have a relationship with many cultural attractions so I can book a block of tickets to package a tour. The unsold tickets are returned two weeks prior to arrival." This allows for the tour operator to sell the package with confidence knowing tickets are available, yet does not leave them accountable for the unsold tickets. All sides involved

benefit; the tourist gets the tickets, the tour operator gets a customer, and the attraction fills the seats.

Vancouver has taken another initiative. A partnership venture, Tickets Tonight, was formed between the convention and visitors bureau (CVB) and Tourism Vancouver to sell tickets to same-day events, at a very reduced rate. The tickets are sold through the information booths, placed in key locations to attract attention from convention and business travellers. "The producers of the arts events were initially apprehensive about providing tickets at a discount, because cannibalization could occur, where one market would be lost at the expense of another, but not one instance has occurred," says Scott Fraser, community and culture representative for Tourism Vancouver. "This simply has not panned out. The partnership with CVB and Tickets Tonight is operated by Tourism Vancouver and it's the latest in the game."

Toronto, the Stratford festival, and the Shaw festival in Ontario depend on ticket-holders to bolster the tourism industry. Tourism Toronto ensures that tickets are available for "spur of the moment" tourists by purchasing large blocks of tickets



Lining up for tickets at the Princess of Wales Theatre, in Toronto.

and selling them at information centres. That way, tourists who are not operating on a set itinerary will still have a chance to attend the shows. "We do sell tickets for some shows, and attractions, but we do this on behalf of the production. There is a partnership between the shows and the tourism industry," explains Ellen Flowers, of Tourism Toronto.

"This is a huge evolution for cultural tourism!" says Fraser. "A strong relationship between tour operators and attractions will ensure that tickets get in the hands of the tourists, to the benefit of the entire industry." *

Young people are on the road

According to recently gathered statistics, travellers that are 33 years old and younger generate about one third of overnight stays in Canadian accommodation properties. There is new evidence this proportion is likely to grow as youth travel enjoys astounding growth levels. For example, student travel has increased 20 to 25 percent each year in the 1990s and that trend continues.

With these and other statistics from the *World Tourism Organization, Statistics Canada and the Student and Youth Travel Association (SYTA)*, the Youth Tourism Consortium of Canada (YTCC) is in the process of building a business case to develop and implement a youth tourism strategy for Canada. "We are working towards relating these economic impact numbers to their usefulness for the business sector of tourism," explains Joël Marier, president of the Consortium and director of Hostelling International Canada (HI-Canada).

At least 20 percent of all tourism worldwide is youth tourism, according to the World Travel Organization). Statistics Canada data relates that travellers under 25 years old represent 53.7 percent more person-visit-nights in domestic travel (non business/not visiting family) than those 55 and over. And, the average backpacker and individual adventure traveller visiting Canada spends \$3,366 during the course of a trip, according to the YTCC survey.

Although at the moment Canada has not made the development of youth tourism a priority, many other countries are seeing an opportunity to tap this growing market. The YTCC wants to bring Canada into prominence as a youth destination and has commissioned a study of youth tourism in countries that have already taken a leading role. The study's main objectives are to gain a better understanding of youth tourism, collect data and best practices from leading countries, and identify market trends.

Directed by professor Bruno Sarrasin of the Université du Québec à Montréal, the *Youth Tourism Situation Analysis – Leading Countries* was published in January 2003. "It is a source of inspiration to determine the future

of youth tourism in Canada; we pledge to continue to evaluate markets trends through research efforts like this one," says Joël Marier.

The study outlines some key characteristics of young independent travellers (18-35 years of age) as shown by research in other countries:

- They travel during shoulder season.
- They take longer trips and spend more in local businesses.
- They tend to be more environmentally conscious.
- They respond less to mass advertising, plan less and desire more flexibility than older travellers.

Not surprisingly, the countries that have done their homework are also global leaders in the business of youth tourism: France, Britain, Australia, New Zealand and Thailand. These countries have all officially recognized that youth tourism is a special sector that requires special strategies. For example:

- France has several tools (travel agencies, guides, discounts) aimed at the youth market, which has been officially declared 'une priorité'.
- Britain takes advantage of its position as a great language learning centre and as the gateway to Europe for English-speaking young travellers. To further its position, Britain is active in international youth tourism organizations and puts out specific (and rather "hip") publications dedicated to young travellers.
- Australia is a hot (in more ways than one!) destination for young travellers. The rate of growth of youth travel there has reached twice the rate of all other travellers. Australia conducts research every year to help the backpacking industry, and the Australian Tourist Commission has specific strategies to attract language learners, seen as a distinct segment of youth tourism.
- Similarly, New Zealand does consistent research on youth tourism; tourism authorities target young travellers by conveying a feeling of freedom and independence. That country's Backpacker Accommodation Council

is instrumental in enhancing the quality of the backpacker product, so essential to young travellers.

• Thailand makes youth tourism a marketing priority, as 10 percent of its tourists are aged between 15 and 24. The Tourism Authority of Thailand works on maintaining the flow of student groups coming to learn Thai culture, and on convincing young travellers that Thailand is a safe country.

"When we see what other countries are doing to attract youth tourism, we know that if don't move ahead in this sector we are

actually going backwards, and this at the time when Canada needs niche markets to uphold its position in world tourism," concludes Joël Marier. *



Hostels lead the way

Hostelling International (HI) is synonymous with young travellers backpacking around the world, and is perhaps the most recognizable player in a sector comprised mostly of small operators. Internationally, HI and its member (HI-Canada) comprise a family of youth travel organizations worldwide and the largest hostel chain. Some 22,000 overnight stays per year (average age of client is 20) take place in HI-Canada's network, 80 percent of which are by backpackers. Structurally, HI-Canada is an Ontario-based national association with 12 regional associations, the majority of which make up half of the HI family.

Information: www.hihostels.ca

Organizing for youth tourism

Fifteen Canadian organizations have formed *Youth Tourism Consortium of Canada*, meeting together for the first time in the spring of 2002. Its Canadian chapter represents the "heavyweight champion" of the youth tourism world, Hostelling International. Others in the accommodation sector are also represented by Global Village Backpackers of Toronto and by the Residence and Conference Centre, as are the visitor and convention bureaux of Montréal and Ottawa.

Youth-oriented travel businesses Temple & Temple Tours, Ellison Tours, New Dimensions, Travel Cuts (all based in Toronto) and Voyages Tour Étudiant (based in Lévis, near Québec City) are part of the core-founding group. Greyhound Canada, Ontario-based Moose Travel Network, Toronto's CN Tower, and the leading free travel publication for independent travellers in Canada, *TRIP*, and the Student Youth Travel Association have signed on. The YTCC aims to position youth tourism high on the public policy agenda to further develop this sector in Canada.

Information: joel.marier@hihostels.ca

Cautious optimism for summer



The tourism industry in Canada is quietly hoping for a busy summer.

Summer in Canada is the busiest season for tourism in the nation, and the events of the past three years have certainly left a few operators fearing the worst and hoping for the best. The multitude of activities and wonderful summer heat which Canadians dream about from October till June is now upon us. So, what should we expect from the upcoming summer?

Operators are still hopeful for a fruitful summer, but without exception all realize the looming possibility of tough times. Many sense a shift in markets, and feel their strongest markets will be domestic or near-by states, filling a void that may once have been occupied by overseas and longer-haul markets in the U.S. The summer of 2003 may yet prove to be a bright spot in what some consider to be a difficult year for tourism throughout Canada.

Operators in the Maritimes are hopeful. Greg Arsenault, director of marketing for Tourism PEI, writes "for visitor inquiries we are up eight percent, year to date. Quebec is up substantially, and

New England is on par, despite not marketing directly to the U.S." Adds Arsenault, "there is a slight drop in domestic inquiries, but Web site visits are up 42 percent. We do expect our motor coach and Japanese visitor numbers to be much lower than last year."

Tourism New Brunswick is playing the waiting game, remaining cautiously optimistic. "In New Brunswick we are at status quo from last year. We have not been in the field with advertising in the U.S. yet but hope to be there soon," says Edward vanDam, senior analyst with Tourism and Parks. "With respect to inquiries we are level with last year and envision the pace to speed up a tad. It is still too early to tell what effects all the events have had on us. Only time will tell."

Fredericton is confident that this season will prove to be very positive for tourism in the city. "Inquiries are still strong from Ontario and Quebec, but we are seeing a lot of interest from Maine and the northeastern U.S.," says David Seabrook of Fredericton Tourism. "We have

a great season planned, in terms of product development, and expect our numbers should be positive."

Quebec has not yet escaped the effects of recent events, but there are bright spots on the horizon. "The influence of SARS is seen in the numbers," says Richard Seguin of the Québec City Tourism and Convention Bureau. "May is usually a busy month for us from the Asian market, yet our numbers have dropped by 15.8 percent." Inquiry numbers help to boost the spirits of local operators. "Overall, we have had an increase of 7.3 percent on the year, and 19.9 percent in May alone so people are expressing an interest in the region."

Ontario is the destination bearing the brunt of SARS effect on tourism. Toronto serves as a gateway for much of southern Ontario and the province will face a challenging summer. "So far we have seen decreased numbers, which can be only partially be attributed to SARS. The cool weather has not helped and many outdoor activities are slow in getting started," says Valerie Wilson, Southern Ontario Tourism Organization. "We are still optimistic. We have confidence in our products and our packaging, with an emphasis on value-added tours."

The prairie provinces remain positive about the upcoming summer. Kate Blau of Tourism Saskatchewan writes, "our expectation is that we will maintain the high levels of visitation and travel spending we've experienced for the past few summers. We expect short-haul markets to be strong." Products and attractions seem to be helping to keep numbers up as travellers are still visiting with their eyes on specific activities. "According to the Saskatchewan Outfitters Association, hunting and fishing outfitters overall have maintained their levels of business despite the difficulties of the last few years. The hunting and fishing segment is a big part of our industry in Saskatchewan, so this is very positive for us."

"It won't be a blockbuster," says Don Boynton of Tourism Alberta about the upcoming summer, "but most markets are recovering, with the exception of Banff with its Asian market." Travellers are tending to

book with less notice. "With the shorter booking times it is difficult to predict, however, we are down two or three percent overall."

Alberta has bumped up its investment in the domestic market by 60 percent and expects to maintain tourist numbers despite the drop in Asian and European travellers.

"Things are uncertain," laments Carol Nelson, director of marketing and sales for North America at Tourism British Columbia. "Without question it has been a challenging year." There still exist "pockets of opportunity" and B.C. has extended its "B.C. Escapes" program, normally run only in the spring, to encompass the summer season as well. "This program has very tangible results, and will build momentum from the spring run. Overseas we have been watching carefully to see what SARS will do. In some cases we have suspended our marketing efforts until the time is right," says Nelson. "The visitors this year will be domestic, and from the neighbouring states, and that is where we have concentrated our marketing."

In the north, Nunavut Tourism is looking forward to having the busiest summer ever, and if the spring is any indication, they are on track. "We have been very busy all year," says Marilyn Scott of Nunavut Tourism in Iqaluit. "Following the royal visit, we have not had a slow season and are rolling right into summer. "We have had a lot of people from Chicago, New York and the northeastern states, as well as Texas." In the Yukon, the outlook for the summer is for flat or modest growth, although enquiries for visitor information are up. The majority of visitor enquiries are from the U.S. and Canada.

Overall, the Canadian tourism industry remains optimistic, and committed to making the best of a difficult situation. With the strength of the Canadian dollar, Canadians have more incentive than before to travel abroad, where they can get more for their money. The very opposite could occur in U.S. markets where the strong loonie means American money doesn't have the value it once did in Canada.

This is a summer of uncertainty. *



Product Development

Summer: so many options, so little time

Summer. The very word brings dreams to Canadians of cottages at the lake, hitting the links, or perhaps hikes over mountain meadows alive with wildflowers. The opportunities are endless, but those "endless opportunities" may not be as easy to profit from as one might have expected. The summer tourism season presents its own unique set of challenges for those in the industry, and with each set of challenges, operators find unique solutions!

Foreign travel to Canada reaches a peak in August, with 3.3 million people visiting from the U.S. and overseas. In contrast January sees only 1.1 million international tourists. The summer season also ends very abruptly, with September numbers just over half (56 percent) of the August numbers.

The warm weather has an effect on domestic travellers as well. Despite recent events, both domestic and abroad, the travel industry is showing strong signs for a positive summer. In fact, a majority of Canadians (58 percent) plan to embark on vacation before Labour Day, according to a recent Expedia.ca / Ipsos-Reid poll; 77 percent of these travellers will stay in Canada for their holidays.

When businesses depend on a busy summer season for survival they must be prepared for anything. The economy, the weather, and even highway construction have a huge effect on the success of our summer tourism industry. And staffing is a major concern, even an obstacle, which many operations must tackle before beginning summer operations.

Seasonal employees need to be found, trained and made familiar with the operation. "Staffing is an ongoing concern with us," says Steve Fraser of Scotia Sea Kayaking Tours, a small company based out of Nova Scotia. "With students it means we are constantly in training mode to replace staff we lose." Staffing for temporary positions

like these consumes time and money. There is little job security, the hours are irregular and fluctuate with the volume of tourists, so scheduling and budgeting for summer employees is difficult. However, Fraser adds, "In most cases it is a win-win situation. We feel that one day they will return, with their families, as customers."

What to do about the competition? You may have the "best in the business" for your particular activity. Your price is fair, your product is great, the sign reads open for business, but where are the people? There is a staggering number of things to see and do in Canada in summer. What tourists choose to do on any given day is often a matter of whim and ensuring tourists "choose you" is a struggle that everyone in the industry faces. "By packaging our tours we can give people something of everything," says Patricia Belfry of Boots Adventure Tours, located in Muskoka. "We capture all of the activities and try to diversify the packages for family getaways, fishing trips, or health and wellness vacations."

Cities – and even many small villages – face the same opportunities and challenges as resorts and adventure operators. In urban centres, summer is the season for outdoor concerts, pageants, parades and reunions of all sorts; most urban destinations plan a full summer schedule of activities for residents and tourists alike. From sidewalk art displays to cultural extravaganzas, the summer agenda is full of choices that lend themselves to packaging for maximize enjoyment – and profits! The urban hotel sector often takes the forefront in these packaging and marketing efforts, to fill hotel rooms left vacant by the summer slowdown in business travel and convention trade.

In summer, urban cultural attractions like museums and galleries must compete with the beaches and lakes for the attention of the



Students working at a cultural attraction in Wakefield, PQ during the busy summer.

visiting public. Programming is all-important, and in some cases (Ontario's Arts in the Wild program for example) out-of-doors experiences are successfully combined with a cultural product. Back in town, walking tours, ethnic neighbourhoods and foods, and summer theatre are popular urban options as demand grows for cultural experiences.

Everyone competes for tourists' available dollars. To a charter-fishing operator, amusement park rides may not be on the list of obvious competitors but when looked at from an "available dollar" perspective, they most certainly are. Packaging offers opportunities to take part in many activities without being forced to choose one activity over another. "We have a small window of opportunity. Everyone in the tourism industry is well aware of the operational time frame and

we base all our business decisions around this," says Fraser. Operators must be able to budget and plan, making the most of their short season. Many operations change activities with the seasons, from mountain biking and hiking in the sunny summer to sledding and skiing in the winter. "The tide is starting to turn for the travel industry. We anticipated a less positive result (this year) with regards to Canadians' summer travel intentions, and are encouraged by the more upbeat response," says Stuart MacDonald, managing director, Expedia Canada Corp.

Summer in Canada is just one of four seasons, each with its own unique personality and problems. The tourism industry in Canada will meet these challenges, no matter what Mother Nature has in store. 

Revisiting Gaspé

by Marie-José Auclair

From time to time, destinations may need to re-position themselves to reflect new product, new markets, and in some cases, new community realities. The Gaspé Peninsula, known in the past for its icon Rocher Percé, is a destination that is presenting itself in new ways. In this article, author Marie-José Auclair discusses the "new" Gaspésie.

A land of contrasts, the Gaspé Peninsula boasts a multitude of spectacular features, from ocean and mountains to lagoons, sandy beaches, rocky hills and sparkling rivers. The coast is dotted with delightful fishing ports and villages, reminders of how life in the Gaspé has been shaped by the ocean and the fishing industry for more than three centuries now.

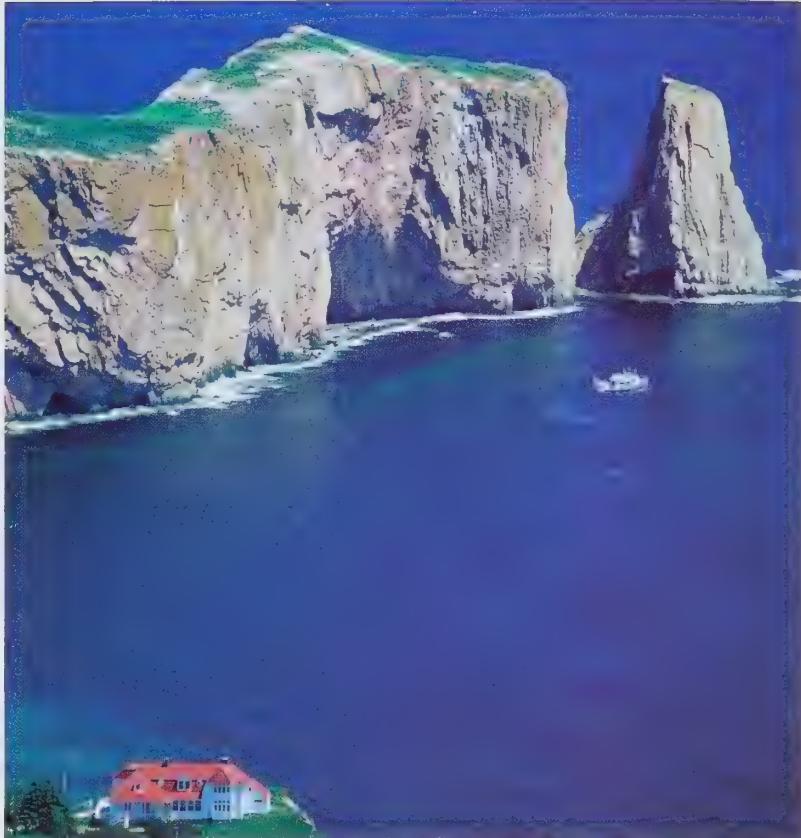
Unspoiled nature abounds all over the peninsula. With large tracts of flora, fauna and land protected in parks and reserves, and breathtaking viewpoints along the rugged coastline, the Gaspé has exceptional potential as an ecotourism destination. It's a paradise for nature lovers and outdoor-sports enthusiasts, and there are plenty of tourism services to help them experience the peninsula's natural attractions.

Gaspé's history – from the initial encounters between the indigenous

peoples and Europeans to the waves of immigrants that fostered an ethnic and cultural mosaic unique in the annals of Québec and Canada – is equally compelling. Visitors can learn the fascinating details at a variety of interpretation centres. All over the peninsula, churches, fish-processing facilities, homes, lighthouses, covered bridges and other charming heritage buildings, splashes of colour against the landscape, also bear witness to local history.

But the peninsula's biggest asset is its people, whose way of life, rich culture and hospitality embody the special soul and spirit of the Gaspé. At scores of workshops, studios and galleries, artists and artisans showcase their creations and share their passion for their work with visitors. Inspired by the salt air and sweeping ocean views, Gaspé's artists add fascinating vibrancy to the region.

Even the food is distinct. Imbued with the distinctive flavour of the sea, regional cuisine is further enriched by the output of the peninsula's many growers and farmers. While fish and seafood are the time-honoured mainstays of Gaspé gastronomy, chefs are increasingly serving restaurant patrons such local fare as goat's cheese, mead, raspberries, emus and caribou. Visiting Gaspé growers is a great



Offering succulent cuisine and creative artisans, Gaspé is alive with culture.

way to learn more about regional cuisine while meeting some of the peninsula's friendly residents.

The Gaspé is a still-developing vacation destination. It is small wonder discerning travellers and those familiar with the region think of it as a well-kept secret, a "sleeping giant" of tourism. *

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Marie-José Auclair is co-author of the book *La Gaspésie, ses paysages, son histoire, ses gens, ses attraits*, Les Éditions de l'Homme, April 2003.

Trans Canada Trail

Prince Edward Island

Population 139,900
Area 5,600 km²

Trans Canada Trail 350 km

New Brunswick

Population 756,700
Area 73,440 km²

Trans Canada Trail 700 km



The New Brunswick end of the Confederation Bridge. Thirteen-and-a-fraction kilometres long, it stretches from Cape Tormentine across Northumberland Strait to Borden, Prince Edward Island. Between those points, its walkway is the Trans Canada Trail.

The history of Canada Day

Canada became a nation in 1867 with the passing of the British North America (BNA) Act and the signing of confederation uniting the provinces as one dominion under the name Canada. The anniversary of confederation was celebrated as Dominion Day since 1868 with the first public celebration at Queen's Park in Toronto on July 1, 1875; and July 1 officially became a holiday under the name Dominion Day in 1879.

Despite its "official" status, the first Dominion Day celebration was also the last, until the 50th anniversary in 1917 when the Centre Block of the Parliament Buildings was dedicated. Then, in 1927, there was a Diamond Jubilee celebration and the laying of the cornerstone for Canada's Confederation Building.

In 1958 the government declared Dominion Day an annual event, and the colour guard gathered on Parliament Hill in the afternoon for a sunset ceremony, mass band concert and a fireworks display. In 1967, Dominion Day was celebrated with a visit from Queen Elizabeth II; in 1968 it was decided that Dominion Day should be a multicultural affair, with professional musicians and a national television broadcast of the events.

Up to this point Dominion Day was held as a single event, hosted on Parliament Hill in Ottawa, but in 1980 the National Committee began to promote and sponsor events across the country with fireworks and celebrations in 15 major cities across the country.

On October 27, 1982, with the signing of the Constitution, Dominion Day officially became Canada Day.



The Research Viewpoint

Rising loonie mostly good news

by Steve Macdonald

Over this past spring and early summer, we have witnessed a rise in the value of the Canadian dollar in terms of other currencies. We began studying exchange rates nearly two decades ago and we have a good understanding of how it affects Canadian tourism. This allows us to make a few clear insights and forecasts.

First, the most important factor determining whether tourism demand rises or falls from any country is not its currency exchange rate, but rather the overall performance of its economy. For example, whether the euro is rising or falling in a particular month is less important than how Germans feel about their economy in general.

Exchange rates, however, do affect all flows of visitors back and forth between international markets. Shifts in the rates have significant influence, are included as adjustments in all our forecasts and business outlook updates, and have a significant but subtle effect on tourism. As our most important market is the U.S., the traffic flows between there and Canada have received more research attention.

The exchange rate question, like nearly every question in marketing, is one of perception. Our series of price-value perception studies, done in the early 1990s, showed us that Canadians are more sensitive to shifts in exchange rates than U.S. residents. Not only did U.S. residents have difficulty perceiving the exchange rate correctly, most of the time it is simply off the U.S. radar.

So when there is a shift in exchange rates between Canadian and U.S. dollars such as we have experienced this year, we expect to see a jump in

demand for outbound trips. It is one more factor that will push outbound flows higher, especially in combination with Canadians' overall feeling of confidence in the Canadian economy and pent-up demand for trips that were put on hold due to military conflict in Iraq and the SARS health scare in Ontario.

Now the good news: because of the difference in exchange rate sensitivity mentioned above, we will not lose as much inbound tourism traffic as we might think. According to a survey we did with the Conference Board of Canada in 1999, a 10 percent rise in the loonie vis-à-vis the U.S. greenback would result in a 15.5 percent rise in outbound traffic, and only a 3.9 percent decrease in traffic from the U.S. Regional breakdowns of the survey show large variation in demand across the U.S. The recent shift also works in our favour because it means advertising in the U.S. is less expensive. This has been particularly helpful this year with the special campaigns to spur a tourism recovery.

A couple of other points are worth mentioning. Some cost factors are beyond our control, such as fees and taxes, and do federal public policy makers determine factors. In-depth studies on the price competitiveness of Canadian tourism products have not all been done by the tourism industry. We have not studied everything. As well, recently the focus has been on short-term benefits and losses from currency shifts. In the long-term, though, the industry benefits most from stable exchange rates. Finally, it must always be remembered that price isn't everything. People come to Canada in response to perceptions of safety, attractiveness, open spaces, and quality products. We need to keep this in mind. 

Travel deficit rising

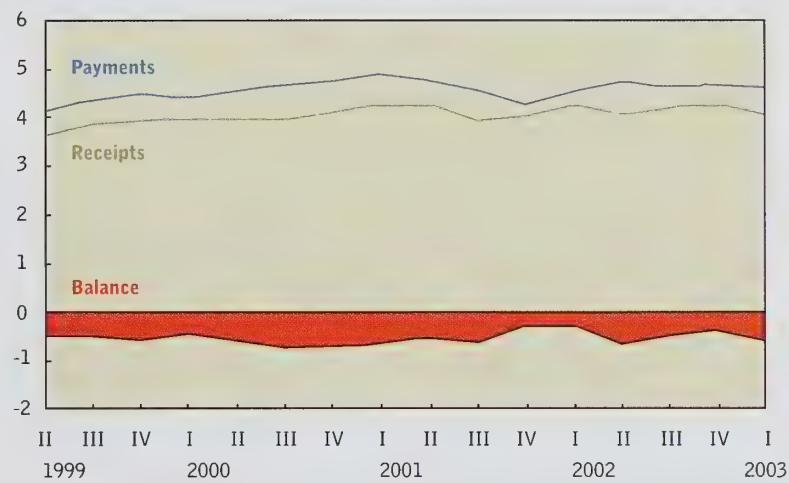
According to the international travel account preliminary estimates released by Statistics Canada, Canada's international travel deficit increased in the first quarter of 2003. The following provides a brief summary of the first quarter preliminary results on a seasonally adjusted basis (change over the previous quarter):

- On a seasonally adjusted basis, the total travel deficit increased by \$158 million (up 37 percent) in the first quarter of 2003 over the previous quarter, reaching an estimated \$585 million. This was mainly due to a drop in travel spending by foreign visitors in Canada. In the first three months of this year, foreign travellers spent over \$4.0 billion in Canada (down 5.3 percent from the pre-

vious quarter), while Canadians spent \$4.6 billion outside the country (down 1.5 percent). This decrease in the overall travel activity is mainly attributed to the war in Iraq and the outbreak of SARS in March.

- The travel deficit with the U.S. increased by \$32 million (up 17.9 percent). Americans spent \$2.4 billion in Canada in the first quarter, a 5.8 percent decrease over the previous quarter. On the other hand, Canadians spent approximately \$2.7 billion in the U.S., a decline of 4.3 percent over the fourth quarter.
- The travel deficit with overseas countries increased by \$125 million (up 50.4 percent) compared to the previous quarter. This is

In billions of dollars



due to the fact that overseas visitors spent less in Canada, while Canadians spent more overseas. Overseas visitors spent \$1.6 billion in Canada, down 4.5 percent compared with the fourth quarter of 2002. Canadians spent approximately \$2.0 billion on overseas trips, up 2.6 percent from the previous quarter.

- On a seasonally unadjusted basis, the total travel deficit reached \$2.6 billion, an increase of 10.5 percent over the same quarter of 2002. 

Information:
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Performing arts

While performing arts enthusiasts represented one of the smallest activity-based segments analyzed in the CTC's most recent series of TAMS (Travel Activities and Motivation Survey) analysis, they represent an important group to learn about because of the high degree of overlap with other culturally-based segments and the anticipated rate of growth of the segment over the next twenty-five years. This growing market is profiled in two new TAMS reports – one for the American market and one for the domestic market.

In order to qualify as "Performing Arts Enthusiasts" (PAEs), travellers must have taken at least one trip that focused on experiencing different cultures/ways of life or experiencing city life and they also must have included at least three of the following activities on their travels: music festivals, literary festivals or events, theatre festivals, opera, ballet or other dance, theatre, classical or jazz music concerts, or musical attractions such as Jazzland. Here are some key findings from the Performing Arts reports:

- The PAE market is appreciably larger in the U.S. (15.6 million) than it is in Canada (1.3 million). Among travellers with recent leisure travel experience in Canada, there were 1.1 million Canadians and 3.8 million Americans.
- This market represents the smallest group of domestic travellers of the activity-based segments, yet the third smallest group of travellers to Canada from the U.S. (only hard outdoor adventure and winter outdoor travellers were smaller U.S. groups).
- Two in three Canadian PAEs are also Visual Arts Enthusiasts – this overlap was even more pronounced among Americans (77 percent). The overlap between American performing arts and heritage tourists was also pronounced (69 percent).
- Canadian PAEs were substantially over-represented in Ontario and under-represented in the western provinces. In addition, PAEs were more likely than average to have travelled to Ontario, Quebec and the Atlantic Provinces.
- While as a whole Canada attracts a disproportionate amount of American travellers from the border states, PAEs who travelled to Canada were more likely to live in mid-tier states than the American adult population as a whole – in fact, they were the most likely segment to live in mid-tier states.
- While Ontario captured the highest proportion of these travellers, American PAEs were disproportionately more likely than other travellers to have visited Quebec and Atlantic Canada.
- Europe represents strong competition for Canadian and particularly American PAEs. Mexico and the Caribbean also represent strong competition for American PAEs.
- Significant demographic variations existed between American and Canadian PAEs. While the culturally oriented American TAMS segment populations were all fairly distributed by gender and American PAEs were no exception, there was a strong variation in gender among domestic travellers. Sixty-three percent of Canadian PAEs were female and only 37 percent were male – this was the same proportion that existed among domestic Visual Arts Enthusiasts.
- PAEs, with a higher than average age, were significantly more likely to live in adult-only households.
- They were the least homogenous of all of the segments – while on average, 13 percent of domestic travellers were born outside of Canada, 24 percent of Canadian PAEs were born outside of the country.
- Of all of the activity-based market segments, the Performing Arts domestic market is expected to grow at the fastest rate over the next twenty-five years, fuelled by the ageing population as well as an increase in immigration. The U.S. performing arts markets will also grow at a faster rate than average, yet not as quickly as the heritage enthusiast market.
- Since older travellers and new Canadians have the tendency to participate in more culturally-oriented activities, all of the cultural activity-based segments featured in the TAMS analysis are expected to experience particularly strong levels of growth.

Information: www.canadatourism.com

A MONTHLY GUIDE TO TRAVEL AND TOURISM DATA

TOURISM ACTIVITY	REFERENCE PERIOD	QUANTITY	% CHANGE FROM PREVIOUS YEAR
TOURISTS TO CANADA			
From the U.S. - Total	January-April 2003	2,858,316	-10.0
By Auto	January-April 2003	1,821,064	-10.6
By Non-auto	January-April 2003	1,037,252	-9.0
From Overseas - Total	January-April 2003	760,158	-3.9
United Kingdom	January-April 2003	173,690	0.9
Japan	January-April 2003	76,570	-10.9
France	January-April 2003	68,546	3.3
Germany	January-April 2003	44,725	-1.3
Hong Kong	January-April 2003	22,859	-21.2
Australia	January-April 2003	37,337	7.6
Taiwan	January-April 2003	15,070	-39.3
Mexico	January-April 2003	34,116	7.6
Korea (South)	January-April 2003	33,372	-5.7
OUTBOUND CANADIAN TOURISTS			
To the U.S. - Total	January-April 2003	3,759,855	-3.9
By Auto	January-April 2003	1,917,544	-7.0
By Non-Auto	January-April 2003	1,842,311	-0.5
To Overseas - Total	January-April 2003	2,095,502	11.2
EMPLOYMENT IN TOURISM			
Total Activities	Fourth Quarter, 2002	579,600	0.5
Accommodation	Fourth Quarter, 2002	136,400	0.9
Food and Beverage	Fourth Quarter, 2002	140,200	1.9
Transportation	Fourth Quarter, 2002	78,700	-5.7
SELECTED ECONOMIC INDICATORS			
Personal Disposable Income per person (\$)	Fourth Quarter, 2002	22,186	3.5
GDP at market prices (current, \$ billion)	Fourth Quarter, 2002	1,142.1	4.6
GDP chained (1997, \$ billion)	Fourth Quarter, 2002	1,062.1	3.4
CPI (1992=100)	April 2003	121.9	3.0
EXCHANGE RATES (IN CDN\$)			
American dollar	May 2003	1.3845	-10.6
British pound	May 2003	2.2465	-0.7
Japanese yen	May 2003	0.0118	-4.1
EURO	May 2003	1.6009	12.7

Note: All tourist estimates deal with trips of one or more nights; all data on this table is not seasonally adjusted.

Sources: Statistics Canada and the Bank of Canada.

U.S. travel intentions strong

A survey conducted by the Travel Industry Association of America (TIA), the Canadian Tourism Commission and a consortium of industry organizations in the U.S. reveals that travel intentions there continue to remain high for summer travel and it appears more people are beginning to plan their trips. Eighty percent of American travellers intend to take at least one leisure trip this summer, and 42 percent either started making plans or have finalized and/or booked their trips.

"It's apparent that Americans won't be easily deterred from travelling,"

says Dr. Suzanne Cook, senior vice president of research and technology for TIA. "As evidence of how resilient Americans are, we simply modify how we travel instead of not travelling at all."

Although negative perceptions about travelling internationally have softened somewhat earlier surveys, the negative continues to very much outweigh the positive; concerns about SARS and the soft U.S. economy are among the factors.

Information: www.tia.org

Tourism Roundup

The federal, provincial and territorial ministers responsible for tourism have formed a **ministerial task force** to develop and implement a **national tourism strategy** to raise the profile of Canada's \$51.7 billion tourism industry at home and abroad. The initiative came out of a ministerial meeting in Vancouver in May, and will result in a report delivered to the ministers at Québec City this autumn.



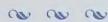
The Student and Youth Travel Association of North America (SYTA) will hold its 7th annual conference September 20-23, 2003 in Montréal, Quebec. Tourisme Montréal will host the conference in cooperation with the Canadian Tourism Commission; some 500 delegates are expected from across North America and Europe.



A **National Tour Association** study conducted in April reveals that 81 percent of the association's member tour operators have a Web site. Nearly all (97 percent) responding tour supplier members and 100 percent of responding DMO members said their company or organization has a Web site.



Fort William celebrates the 200th anniversary of the Great Rendezvous, a traditional gathering held at what is now **Fort William Historical Park** near Thunder Bay. Fur trade enthusiasts from across the U.S. and Canada are expected to join in the festivities July 11-13.

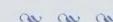


Each year, **Toronto's CN Tower** welcomes over 250,000 youth visitors. This number includes local schools as well as international outings, and represents 20 percent of the World's Tallest Building's annual attendance. "We like young people coming to the CN Tower because it's a great experience for them. The CN Tower is a kid-friendly attraction offering a dynamic experience that is both entertaining and educational," says Jack Robinson, CN Tower director of sales.

an eye, it takes a concerted and collective effort to turn it back on," said NTA president Hank Phillips, recognizing the importance of helping Canada recover from recent tourism industry struggles caused by the outbreak of SARS.



Stephen Burnett and Steven Thorne have launched Burnett Thorne Cultural Tourism, a Toronto-based consultancy specializing in **planning, developing and marketing cultural tourism destinations**. The company "will address the need for practical, industry-oriented solutions for cities, regions and provinces seeking to realize their cultural tourism potential."



The Hotels Association of Canada's president, Tony Pollard, has written a letter to the federal minister of Health on behalf of the association opposing proposed legislation that would force **nutritional labeling** on restaurant menus. Hotels with less than \$10 million in sales would be exempt.

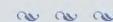
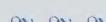


Photo: courtesy of Musée de la civilisation, Composite Harnois (Armure). Wrought Iron, drawn iron, brass and leather. Coming from French, German and Italian workshops, Towards 1480. Museum of Army, Paris. G-4

From May 21, 2003, to March 28, 2004, the Musée de la civilisation in Québec city presents *Gratia Dei. A Journey Through the Middle Ages*. The exhibition takes visitors in the footsteps of yesterday's knights, villains, trouvères, peasants, prelates, lords, and their ladies, on a route dictated by divine authority, and also by the rule of man.



Alberta's film industry is mounting strong opposition to a Parks Canada proposal to hike fees for shooting movies and commercials in national parks, including Banff. The federal agency is proposing a significant hike in film permit fees to generate more money to fix rundown infrastructure in the parks, but **Alberta Film Commission** officials say if fees are increased as proposed, companies will likely take their business to "other scenic spots, such as neighbouring Kananaskis Country," located west of Calgary.



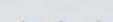
Seventy percent of all schools in Canada organize at least one overnight school trip every year.

On average, school trips last for 3 days and **each student triggers \$100 in spending** every day.

"Young travellers spend much more than most people think, and student travellers confirm this fact," notes Michael Palmer, head of the Student and Youth Travel Association of North America, and vice-president of the Youth Tourism Consortium of Canada.



The **National Tour Association (NTA)** and **Tourism Toronto** have together announced that Toronto will be the site of the NTA board of directors meeting in September. "Since September 11, we in the industry have all learned how fragile tourism can be, and while it can be turned off virtually in the blink of



Fourteen restaurants on the Acadian Peninsula have joined together to form "**La Route des fruits de la mer**" (the Seafood Trail) with the goal of offering tourists a high quality seafood dining experience. The initiative is the brainchild of Roland Besnier of the Acadian Peninsula business men's group, and is patterned after similar tourist "trail" projects in France and Quebec. *

Artistic director **Richard Monette** will remain the artistic leader of the Stratford Festival of Canada through the 2007 season, making him the longest-serving artistic director in the festival's history.

Michele de Rappard has been appointed director of marketing for Rocky Mountaineer Railtours (RMR). She has been with the company since 1990 when it first began operation. **Karen Derksen** has been appointed retail manager, joining RMR from Petcetera, where she was senior buyer.

Marc-André Charlebois, ACTA president, has been nominated to the board of directors of the United Federation of Travel Agents' Associations.

Stuart Brown joins the restaurant management team at Victoria's Hotel Grand Pacific. Brown moves to Victoria from Whistler where he and chef Bernard Casavant created B.B.K.'S Pub and Bistro.

Johnny C. L. Tsang has been appointed general manager of The Empire Landmark Hotel & Conference Centre in Vancouver. Tsang's career has included positions with Hyatt Regency, Holiday Inns and Lee Gardens Hotel in Hong Kong. Also joining The Empire Landmark is **Bobbi Rhodes** as director of sales and marketing. She has an extensive background in sales, marketing, advertising and operations, having worked with Holiday Inn, Best Western, Comfort Inns and Renaissance Hotels.

Fairmont Hotels & Resorts has announced general manager appointments at four destinations. **Roger Soane**, general manager, The Fairmont Royal Pavilion and The Fairmont Glitter Bay, Barbados; **Alex Kassatly**, general manager, Fairmont Le Château Frontenac; **Charles Head**, general manager, The Fairmont Winnipeg; and **Brigitte Fritz**, general manager, The Fairmont Palliser. 



What are they looking for?

The Canadian Tourism Human Resource Council (CTHRC) asked tourism employees what they like most about their jobs. While the responses themselves were not unexpected, the consistency of responses across several occupations was. Whether front-line workers or those in management positions, the respondents cited many of the same benefits: variety, dealing with people from across Canada and around the world, abundant employment opportunities, advancement potential, easy to get started in the industry, the opportunity to be creative, and the numerous entrepreneurial opportunities.

The Canadian Tourism Human Resource Council will continue to address on-going human resource issues with regular contributions to **TOURISM**. 

Information: www.cthrc.ca



Tourism Profile

Penny McMillan

To keep our readers informed about key decision-makers in Canada's tourism industry, **TOURISM** is introducing members of the Canadian tourism industry. Each profile highlights the personal vision of these industry leaders as they voice their opinions on important issues facing the tourism sector.



Penny McMillan is the Tourism Director of Destination Winnipeg Inc. Prior to joining Destination Winnipeg, she worked for Canadian Pacific/Canadian Airlines. As a side line, she owned a ladies lingerie boutique in downtown Winnipeg.

McMillan currently serves on the Boards of Rainbow Stage, Heritage Winnipeg, the PowerSmart Festival of Lights Parade, and regularly contributes to a number of other organizations by participating on Advisory Boards and Committees on specific projects. She is a member of the Canadian Association of Convention & Visitor Bureaus (past chair), the International Association of Convention & Visitor Bureaus and Tourism Industry Association of Canada.

McMillan is the Chair of the National Committee on Meeting, Conventions and Incentive Travel for the Canadian Tourism Commission (CTC). She feels the long-term goal of the CTC is to expand economic growth in the tourism industry through increasing travel to Canada from international markets, and to encourage Canadians to travel in their own country.

McMillan notes that the number one priority for the CTC in 2003 is to be a leader for the industry in a year of collective, and unprecedented, challenges across the nation. 

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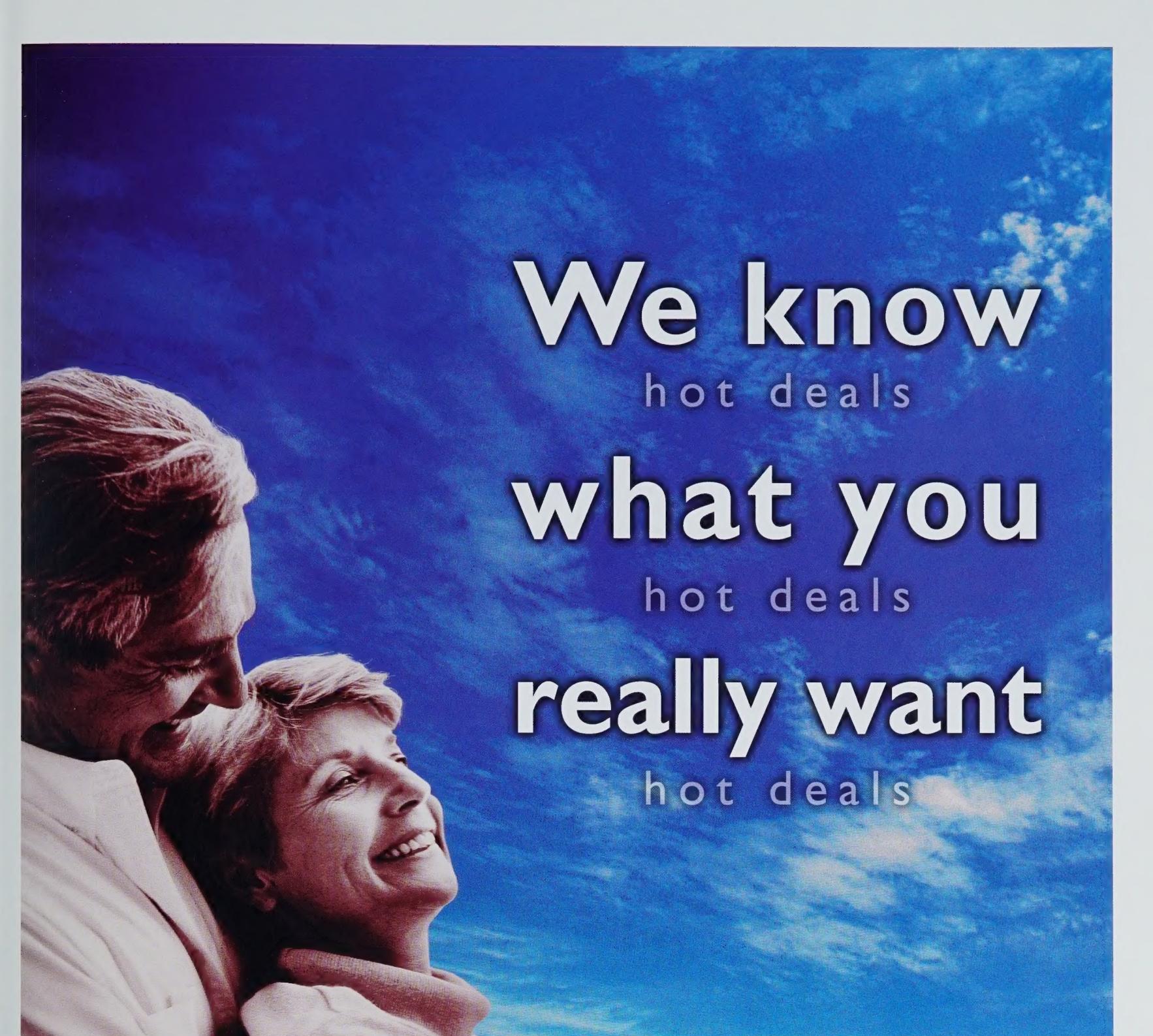
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